

14. POSITION SUMMARY:

Under close to limited supervision of the Benefit Initiation Supervisor, this position provides case management customer service for the Benefit Initiation Section for routine and non-routine, complex Wisconsin Retirement System annuitant and non-annuitant inquiries and requests as well as issues detected internally. This position also processes and computes complex benefit applications, determines death benefit eligibility, calculates, audits, and finalizes benefit payments. Effectively communicates both by phone and in writing with WRS participants to resolve benefit questions and issues. These issues relate to such topics as: benefit eligibility, benefit calculations, forced distribution payments, adjustments to existing benefit payments, taxability of benefits, life insurance, and collection of overpayments.

The job responsibilities require significant knowledge of business rules, WRS statutes and administrative code, principles, practices and precedents related to benefit eligibility, calculations, and payments.

In addition, this position serves as a liaison between the Benefit Services Bureau sections as well as between the bureau and other areas of the department in gathering and analyzing information, determining alternatives, preparing proposed courses of action, ensuring consistent policy interpretation and application, documenting resolutions, and communicating with members and internal partners. Participate and serve as a subject matter expert on projects to automate, enhance, and/or streamline existing or new processes, division/department/bureau policy review, and other initiatives. The position will also be responsible for documenting and training staff on new and changing procedures.

15. GOALS AND WORKER ACTIVITIES

50%

Goal A: Case management analysis and resolution including provision of detailed WRS retirement and death benefit eligibility and complex computation information to benefit recipients and their representatives and internal and external business partners.

- A1. Respond to internal and external calls, e-mail, faxes, and letters from ETF staff, non-annuitants, annuitants, survivors and their representatives regarding benefit eligibility, benefit calculations and re-calculations, annuity corrections, required distributions, benefit overpayments, variable fund participation and transfer processes.
- A2. Initiate contacts to benefit applicants/recipients and their representatives to obtain additional information needed to determinate eligibility and appropriate calculations.
- A3. Initiate contacts to benefit recipients to explain the reason for the benefit overpayment and implications of present value offsets, and coordinate with the Collections Unit to make other repayment arrangements.

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- A4. Analyze information provided by applicants, annuitants, survivors, or their representatives and relevant department records, policies and procedures.
- A5. Research, interpret, and apply relevant Wisconsin statutes and administrative code as well as federal Internal Revenue Code pertaining to WRS non-annuitant and annuitant cases.
- A6. Assist benefit applicants/recipients in preparing forms and documentation to address their specific needs in accordance with governing laws, rules, and policies.
- A7. Determine and evaluate alternative courses of action and the implications of each within established policies.
- A8. Identify account cases requiring legal counsel interpretation and/or advice; prepare and conduct briefings to obtain management approval for submitting legal services requests.
- A9. Develop recommendations for resolution.
- A10. Review analysis, conclusions, and recommendations with affected bureau supervisors, and/or director when appropriate, and other department stakeholders.
- A11. Prepare supporting documentation and effectively communicate decisions and outcomes to benefit applicants/recipients formally on behalf of the department.
- A12. Develop communications on case management analysis and results for informing the staff in the Benefit Initiation Section and other work units in the bureau, division, and/or department.

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Goal B: Processing of separation, retirement, and death applications, and computation and audit of benefits. Processing of special checks, managing changes to system on the day after download, and completion of Child Support Lien Docket tasks.

- B1. Review benefit applications for proper completion.
- B2. Determine eligibility for the benefit and payment option selected according to statute, code, and written procedures and update estimates when needed.
- B3. Calculate benefit under applicable laws that are most advantageous to applicants. If applicant fails to exercise rights to maximize benefits, refer case to Member Services Bureau for further counseling.
- B4. Determine taxability of benefits and calculate income tax withholding according to federal regulations and written procedures.

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- B5. Determine eligibility and certify continuation of life insurances, the amount and type of coverage, and method of premium payment.
- B6. Determine the need for special check, request approval, calculate the amount of the check and the retro exclusion, and notify the distribution group when complete.
- B7. Manage changes in the system with special access on the day after cut-off.
- B8. Complete Child Support Lien Docket tasks on a weekly basis.

10%

Goal C: Provision of subject matter expertise within section in projects aimed toward automating or enhancing existing activities and tasks or implementing requirements, such as legislative mandates. Consultation and assistance to business analysts and IT staff on the development, testing and implementation of strategic plan objectives and legislative mandates.

- C1. Serve as a liaison and consultant to business analysts and IT staff, and represent the section in projects aimed toward automating existing manual activities and tasks.
- C2. Identify opportunities for improvements in section/bureau processes; changes needed to implement business re-engineering and/or strategic plan objectives; and proposed statutory and administrative code language changes to enhance service and efficiency. Collect input from affected stakeholders. Evaluate alternatives and develop conclusions and recommendations.
- C3. Provide consultation to business analysts and IT staff to ensure that recommendations, development, testing, and implementation are on track.
- C4. Participate in cross-functional discussions and workgroups to analyze process improvements.
- C5. Conduct research and prepare detailed project requests.
- C6. Provide consultation to business analysts and IT staff on the preparation of business user requirements and user acceptance test plans.
- C7. Provide consultation to business analysts and IT staff on the performance of business process testing and implementation, and analysis of issues, system testing, and documentation.
- C8. Document results of policy and process reviews and provide input for section/bureau implementation of changes.
- C9. Effectively communicate decisions and outcomes to affected parties.

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10%

Goal D: Documentation and training on new and changing procedures.

- D1. Review, recommend and provide input to section policies and procedures; draft procedures.
- D2. Review, recommend and provide input on the creation and improvement of forms used by the section.
- D3. Assist in planning and development of section training plans and materials to support WRS knowledge transfer.
- D4. Train and audit the work of new staff as directed. Monitor progress of assigned trainee(s), respond to questions and inform Supervisors and Lead Worker of concerns or problems.
- D5. Provide training on new/changing procedures to affected staff within and outside the Section as directed.

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KNOWLEDGES, SKILLS & ABILITIES:

1. Knowledge of state and federal laws, rules and regulations governing the Wisconsin Retirement System.
2. Knowledge of Section business processes and the IT systems that support them.
3. Ability to effectively communicate technical information to non-technical internal and external customers orally and in writing.
4. Ability to perform complex mathematical calculations.
5. Ability to acquire and apply new knowledge and skills for work.
6. Ability to adapt to departmental transformation along with changing priorities within the section.
7. Ability to work in a team environment by actively working with others to achieve desired goals.
8. Skills to identify, recommend, and implement change to maximize efficiency.
9. Ability to handle multiple priorities at once and work effectively under pressure.
10. Skill to apply departmental compliance policies, practices and procedures.
11. Ability to use complex and sophisticated computer based software systems including Microsoft Office.
12. Knowledge of planning and organizing work to meet deadlines or unanticipated needs or priorities.
13. Ability to establish productive and efficient working relationships.
14. Ability to train and audit work of other staff.
15. Knowledge of confidentiality rules and procedures.
16. Knowledge and understanding of the mission, organization and activities of the Wisconsin Retirement System.
17. Knowledge of basic project management skills, and system development and testing practices.
18. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.